

# KANTAR

**Discovers what others  
cannot, at speed with scale**

Digital (Dx) Analytics

Kantar Analytics, April 2021



**Dx** Analytics

## Today's presenters



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# In an age of unparalleled data proliferation, companies are data-rich, but insights-poor and impact-starved



Siloed data



Unstructured data



Uncontextualized data



Short-term perspective



...and pressures on marketers are stronger than ever...

Need to innovate  
more quickly

And place the right bets  
to optimize brand strategy

With new thinking  
and methods

# **Dx Analytics:** The Power of Digital Data

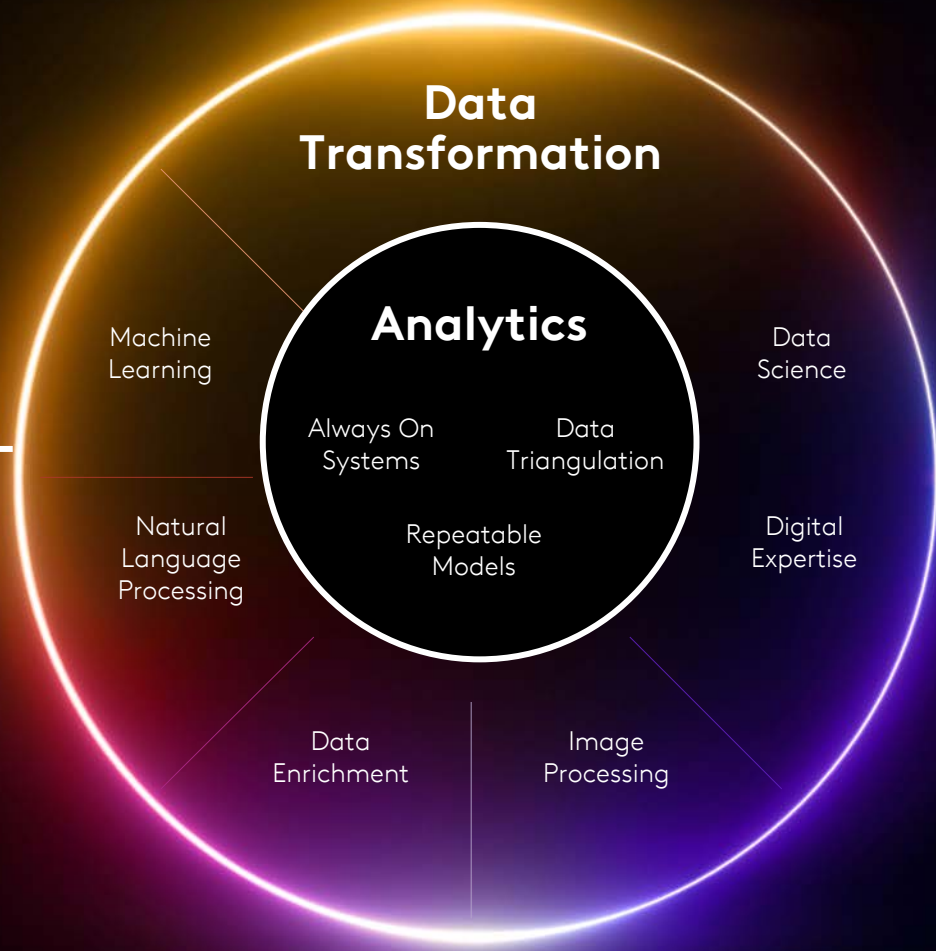


# Dx is uniquely positioned to match the right data to the right question

## Search



## Social



## eRetail & Reviews



## Digital Marketing Tools

# The Value of Public Digital Data: Search

Search data allows us to measure how often people in different places search for specific concepts in Google, showing either interest/demand or actual usage depending on the keywords.

We can use this data to measure the popularity of different brands, products, and concepts, and how interest in these topics has developed over the past weeks, months, and years.

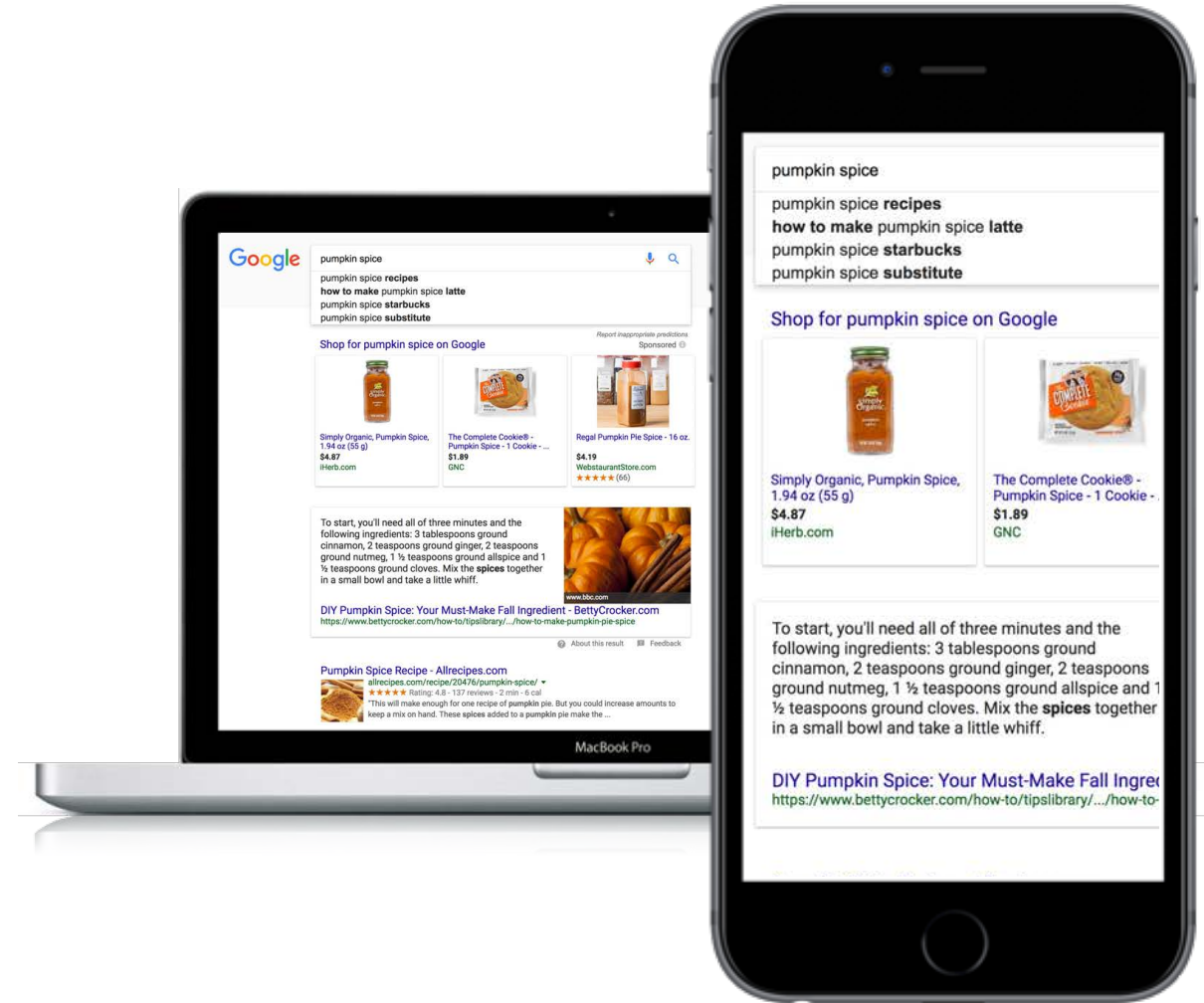
## Key Benefits:

Full Population-Level Data

Predictive of Demand

Honest Signals

Real-Time





# The Value of Public Digital Data: Social

Social analytics data – a.k.a. social listening data – allows us to track consumer conversations around any topic, including brands, categories, or broader societal concepts.

We can use this data to capture the voice of the consumer when they discuss their perception of brands, their needs within a category, and more. We can also segment authors into relevant groups and compare salience and sentiment between different types of consumers.

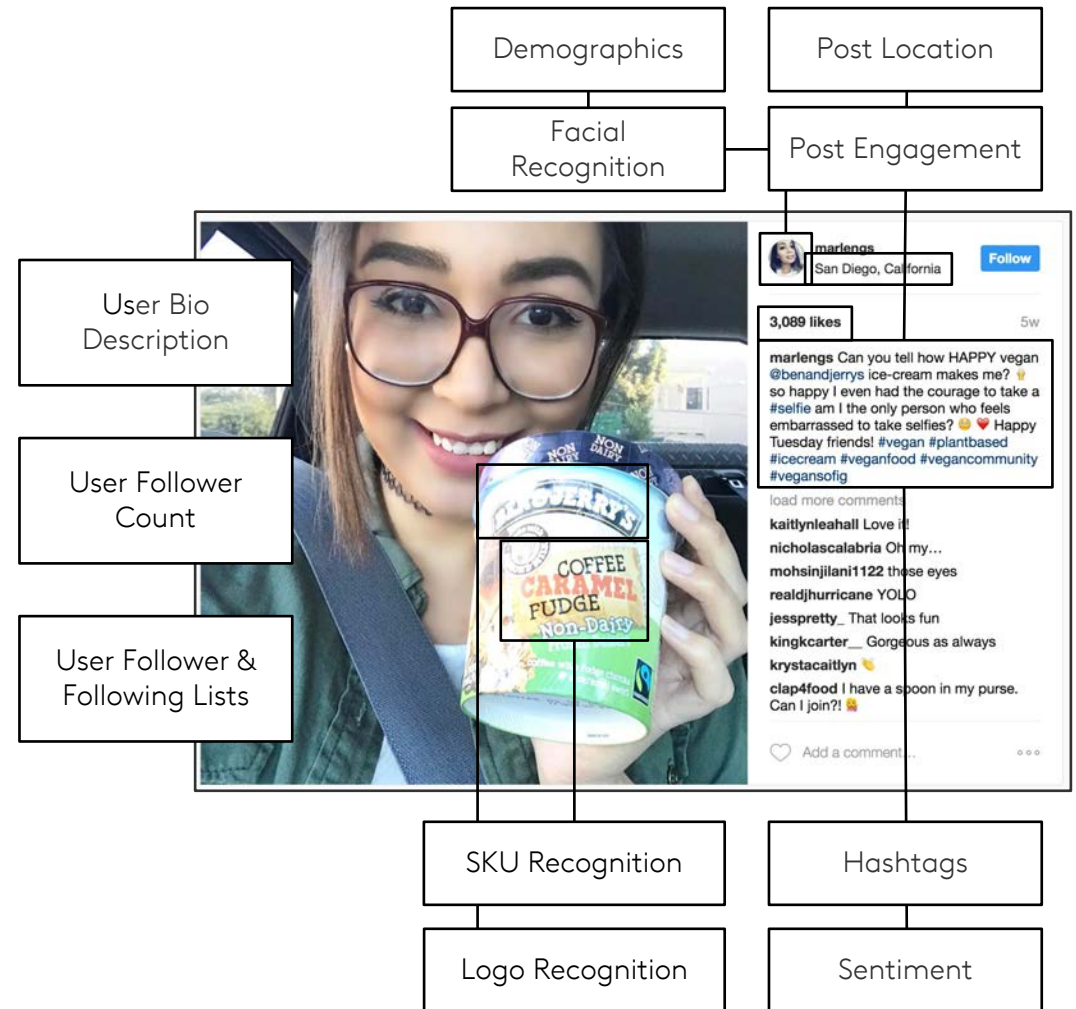
## Key Benefits:

Rich Context & Metadata

Can Focus on Audience Segments or Individuals

Includes Images, Links, and Text

Real-Time





# The Value of Public Digital Data: eRetail Reviews

eRetail reviews data allows us to analyze testimony from thousands of consumers specifically reviewing individual SKUs from a brand. Often, these reviews are far more detailed than testimony found in social.

We can use this data to analyze purchase drivers & barriers within a specific product set or broader category. We can also use this data to understand a brand's overall share of shelf in ecommerce and how their products appear.

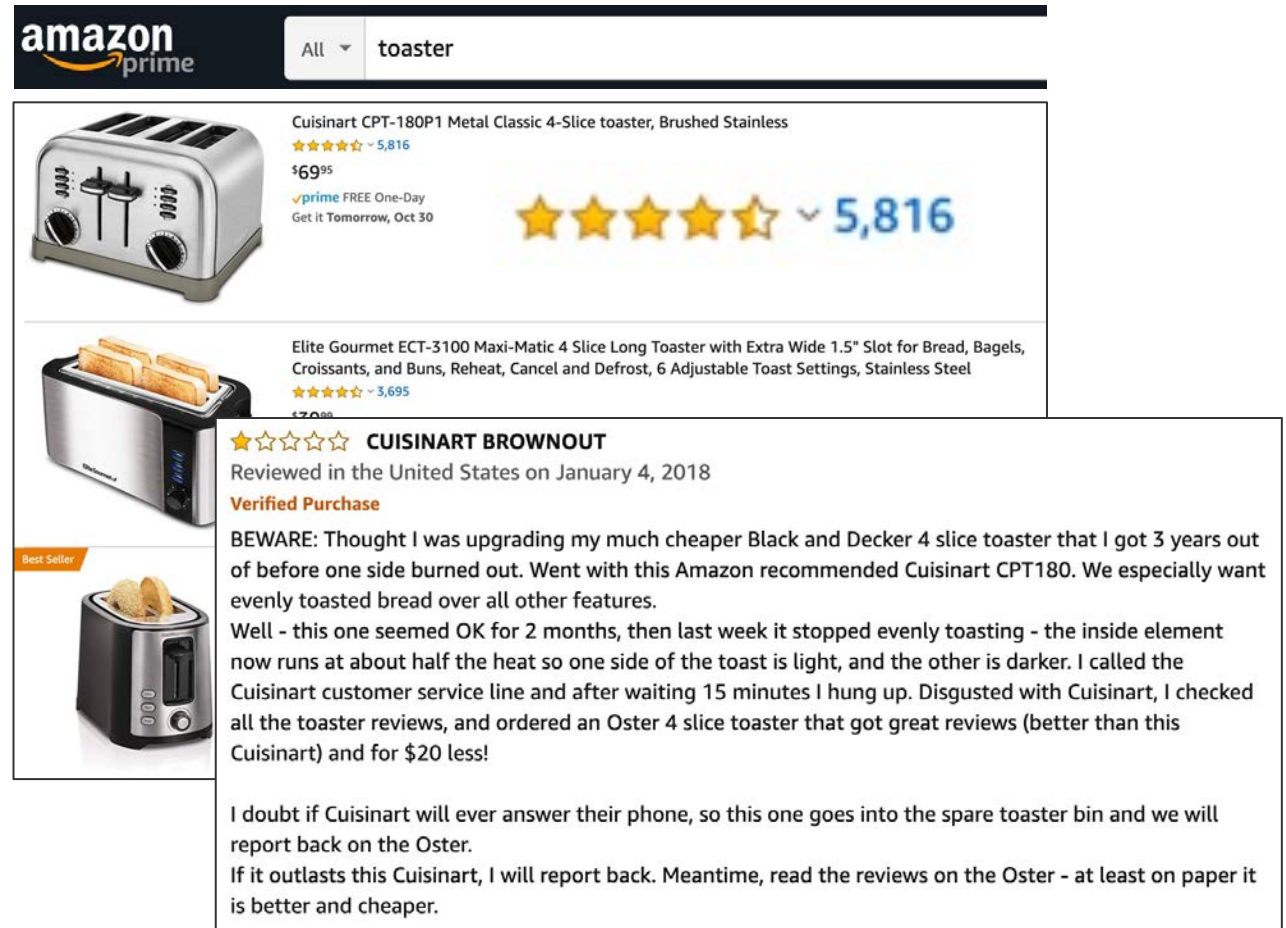
## Key Benefits:

Details of Purchase Drivers & Barriers

Influence on Future Sales Decisions

Specifies an Exact Brand & SKU

Contains a Sentiment Score



The screenshot shows an Amazon Prime search for 'toaster'. The top result is the Cuisinart CPT-180P1 Metal Classic 4-Slice toaster, Brushed Stainless, priced at \$69.95 with a 4.5-star rating from 5,816 reviews. Below it is the Elite Gourmet ECT-3100 Maxi-Matic 4 Slice Long Toaster, priced at \$70.00 with a 4.5-star rating from 3,695 reviews. A 'Best Seller' badge is visible next to the Elite Gourmet toaster. A detailed customer review for the Cuisinart toaster is highlighted, titled 'CUISINART BROWNOUT', dated January 4, 2018, and marked as a 'Verified Purchase'. The review text reads: 'BEWARE: Thought I was upgrading my much cheaper Black and Decker 4 slice toaster that I got 3 years out of before one side burned out. Went with this Amazon recommended Cuisinart CPT180. We especially want evenly toasted bread over all other features. Well - this one seemed OK for 2 months, then last week it stopped evenly toasting - the inside element now runs at about half the heat so one side of the toast is light, and the other is darker. I called the Cuisinart customer service line and after waiting 15 minutes I hung up. Disgusted with Cuisinart, I checked all the toaster reviews, and ordered an Oster 4 slice toaster that got great reviews (better than this Cuisinart) and for \$20 less! I doubt if Cuisinart will ever answer their phone, so this one goes into the spare toaster bin and we will report back on the Oster. If it outlasts this Cuisinart, I will report back. Meantime, read the reviews on the Oster - at least on paper it is better and cheaper.'

# Dx Analytics:

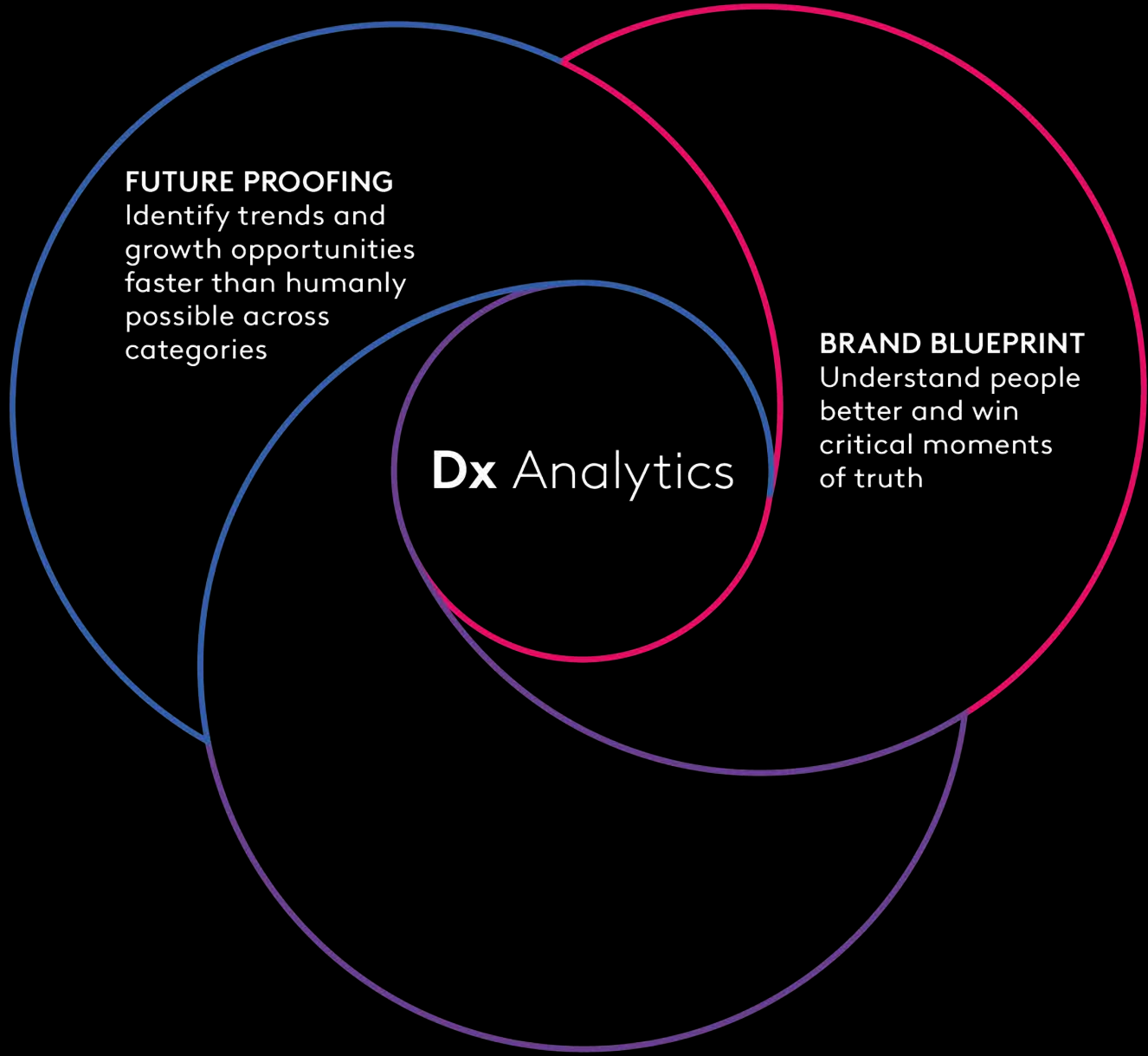
## Three Analytics Pillars



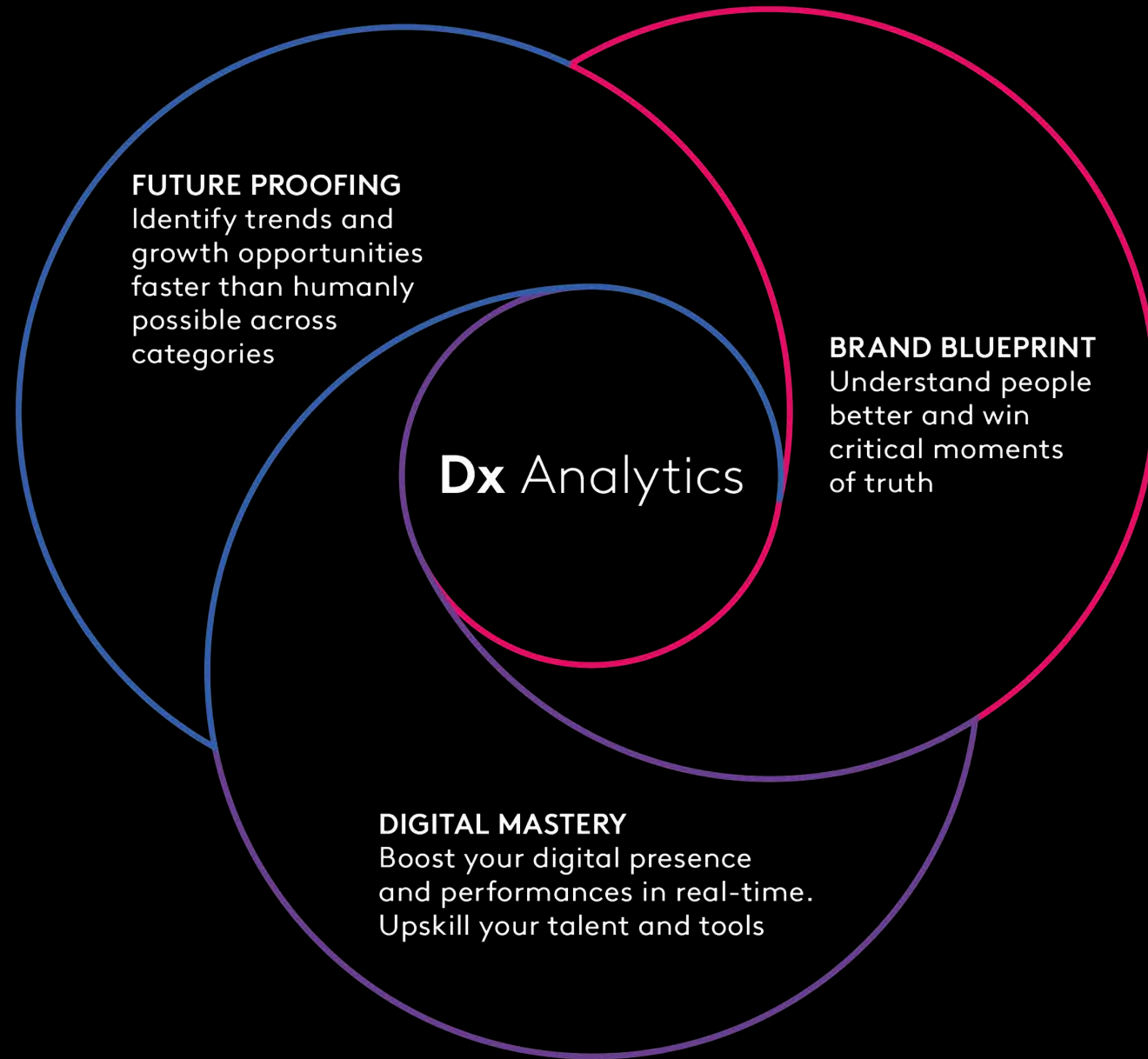


**Dx** Analytics

**BRAND BLUEPRINT**  
Understand people  
better and win  
critical moments  
of truth







**FUTURE PROOFING**  
Identify trends and growth opportunities faster than humanly possible across categories

**BRAND BLUEPRINT**  
Understand people better and win critical moments of truth

**Dx Analytics**

**DIGITAL MASTERY**  
Boost your digital presence and performances in real-time. Upskill your talent and tools



# Dx Analytics:

Deep Dive into Future Proofing

# For trends, COVID was a shock to the system

Many companies did not have the infrastructure to respond quickly



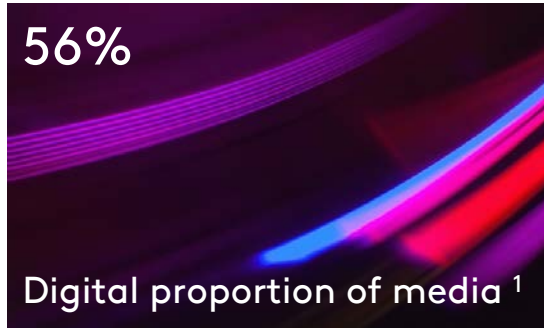
Accelerated Trends



New Trends

# Macro accelerations that seem like they're here to stay

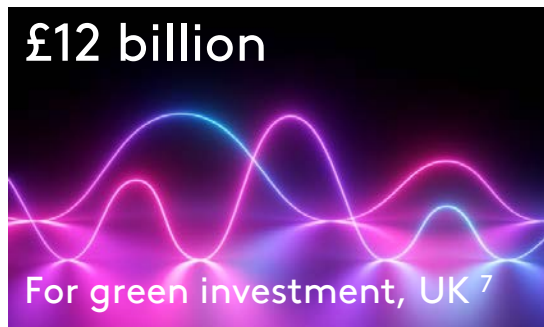
## Digital primacy



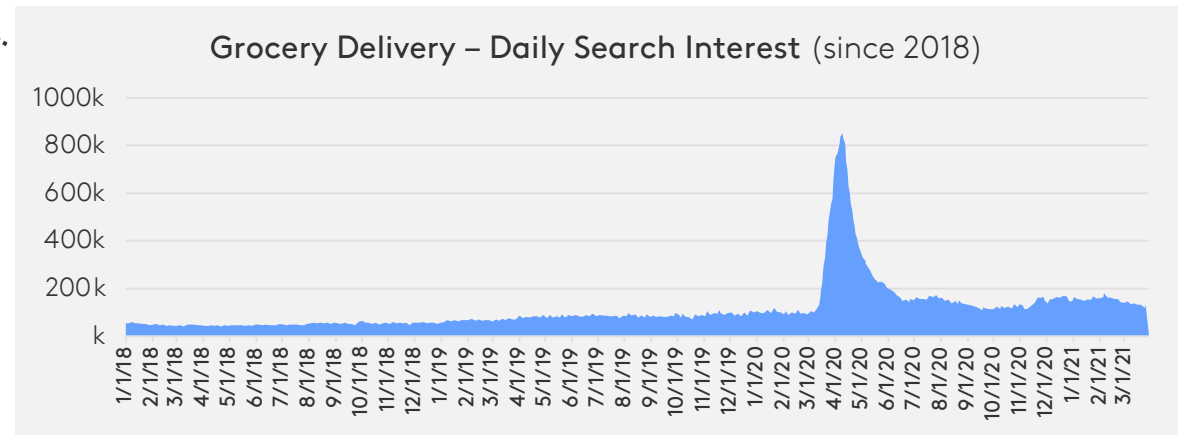
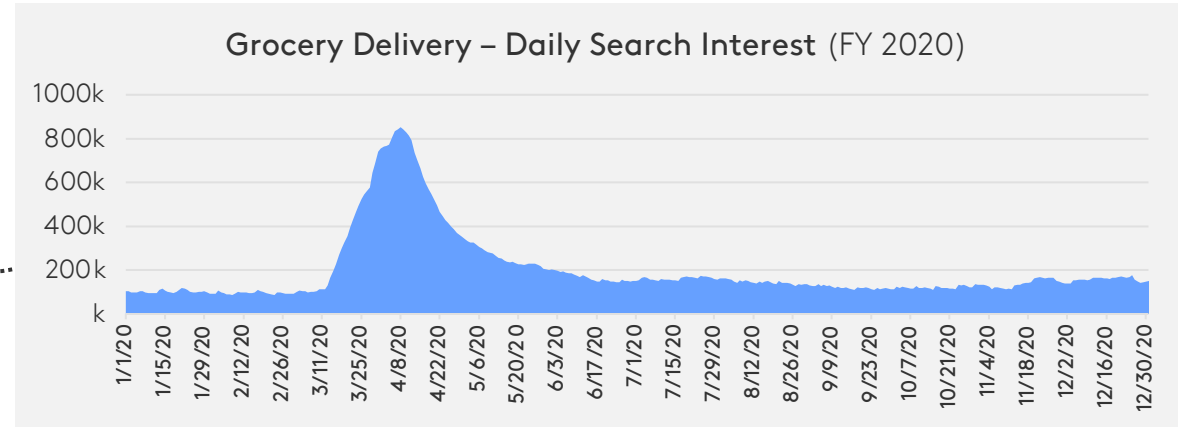
## Home delivery



## Green pivot point



## Working from home



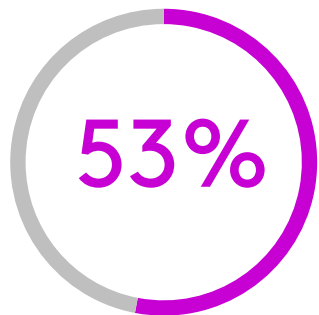


# Smaller change which may or may not persist

## Localism

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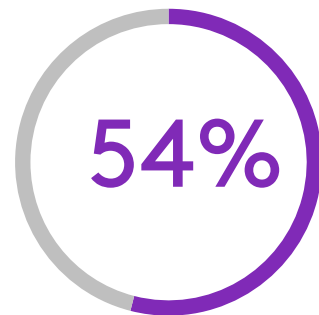
COVID has forced people to think local and worry about its effect on their neighborhoods. There is a 53% increase in searches for local businesses, with equivalent rises for local food and farm shops.



## The exotic at home

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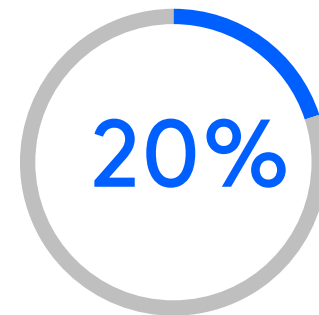
New experiences are hard to come by - people are making do by being creative at home and looking forward to better times: with a 54% increase for searches related to learning a foreign language, plus a 15% increase in searches for cocktails.



## Beauty in the frame

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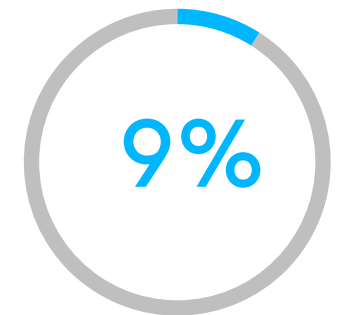
Never have we been confronted more with our own image, and it's affecting the way we see ourselves. This leads to behaviour change: searches for mild skin conditions such as acne are up by almost 20%.



## Thriving vs surviving

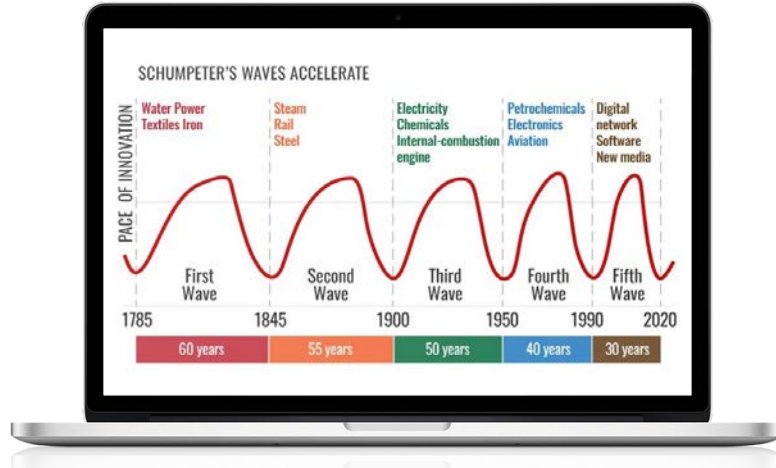
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Gaps between the haves and have nots are widening. There's been a 9% increase in search for 'most expensive' while 20% of households have reduced their average basket spend by at least 7%.



# Covid-19 made clear what has been coming

Companies need to be more agile in responding to change



## Change is accelerating

You thought the world was changing fast in the last decade – we're now entering the new, sixth wave of innovation. Buckle up.



## Disruptors are shaking every market

Yes, even ready-to-eat breakfast cereal. [Magic Spoon](#) is a rapidly-growing DTC eCommerce seller of healthy cereal options with reduced sugar & high-protein options, and lots of podcast ads.



## First movers win, as do fast followers

First movers grab market share. But if you're not first, a close second is OK – but requires near perfect execution.

# A traditional trends approach

Exaggerated for effect

## Product Development



Once a year

- Within category
- Within countries of interest

## Marketing Comms



Per campaign

- Preconceived ideas-driven
- Within countries of interest

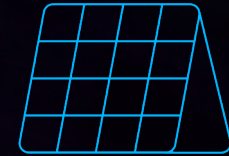
## Brand Strategy



Once a year

- Current positioning-based
- Within countries of interest

## Portfolio Strategy (M&A)



Once a year

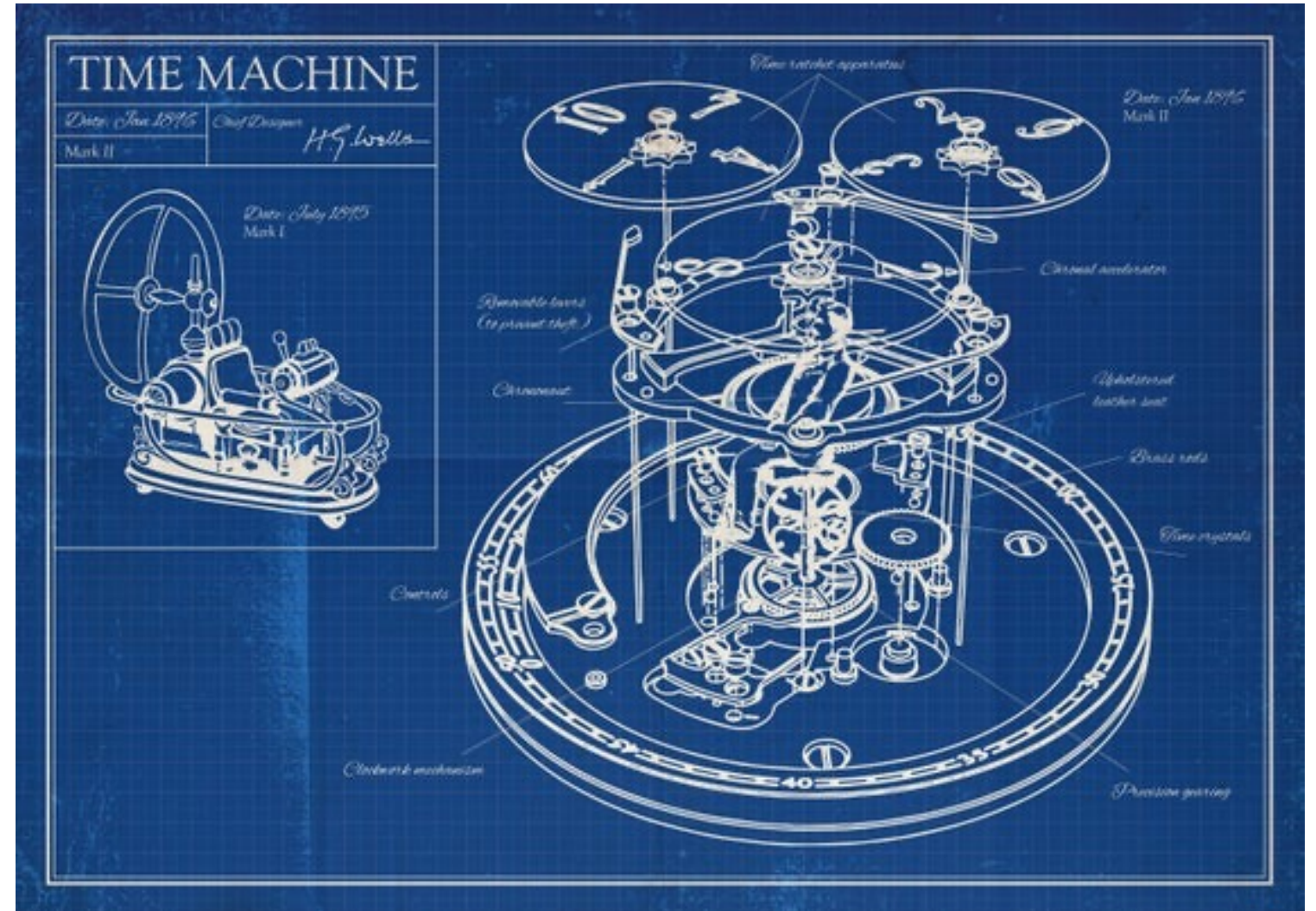
- Current positioning-based
- Within countries of interest



# A better trends engine

1. Speed
2. Look across borders
3. Find niches
4. Consumers and companies
5. Robust prediction
6. Macro changes

Feeding all functions of the organisation

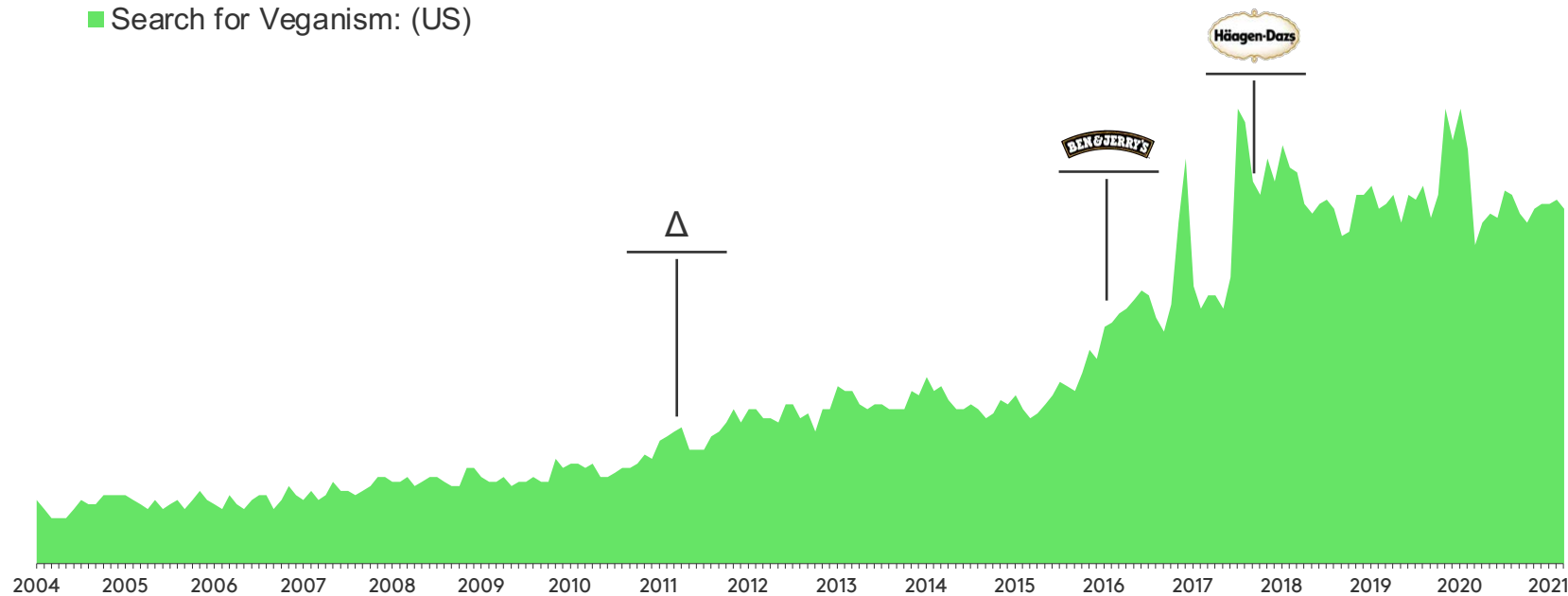




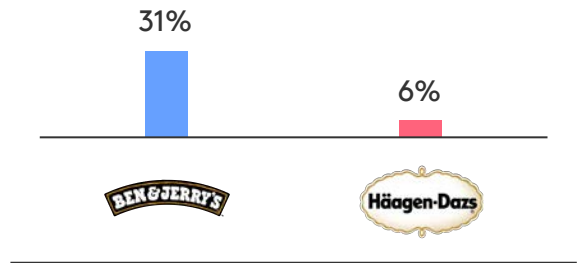
# 1. Why speed matters

Being first to market offers many rewards

Ben and Jerry's being first to market has given them a lasting legacy with a great future. Perhaps they could have been even earlier?



Vegan Ice Cream  
(Share of Search, US)



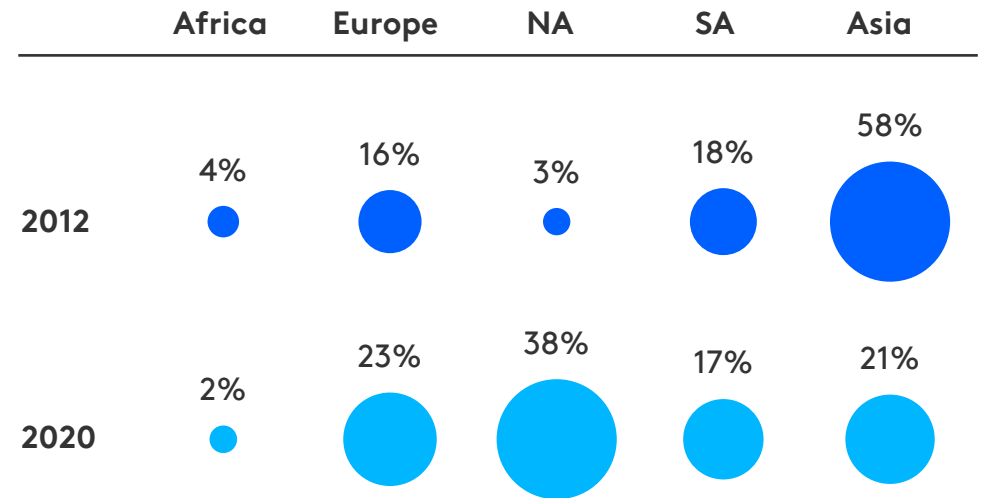
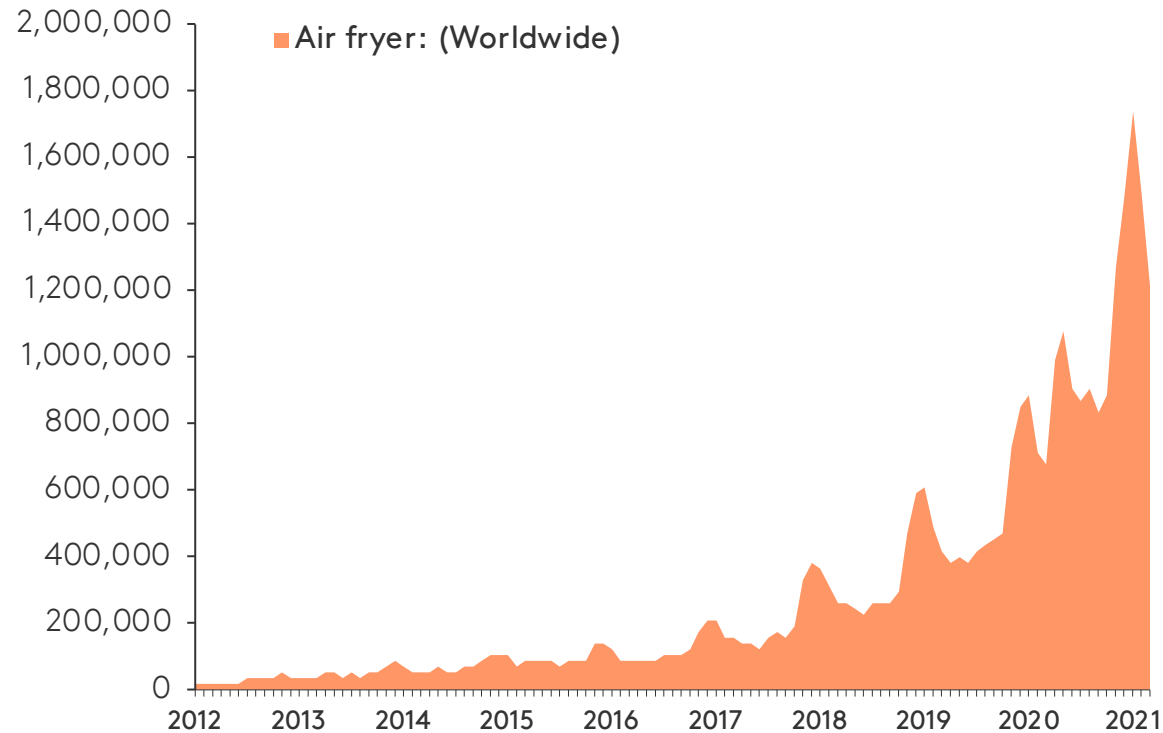
Vegan Ice Cream Market to Experience Significant Growth



## 2. Why 'outside in' matters

Crossing category and geographic borders

### How air fryers conquered the world



See also cross-category

- Organics/Naturals
- Cannabinoid/CBD

# EMERGING TRENDS

Dx Analytics – Discover what others cannot

# KANTAR

FILTERS ACTIVE ON THIS PAGE

Clear all Filters

TOPICS: Use this section of the report to filter and select different topics (use CMD or CTRL + click for multiple selections). These will in turn filter the related search queries further down the page.

### TOPIC SELECTOR

Use the dropdown & sliders to select TOPICS by area, search volumes & growth; the table and chart will update.

AREA  
All

TOPICS - AVG MONTHLY SEARCHES  
35 48,013,081

4 WEEK TREND  
-48.3% 7.0%

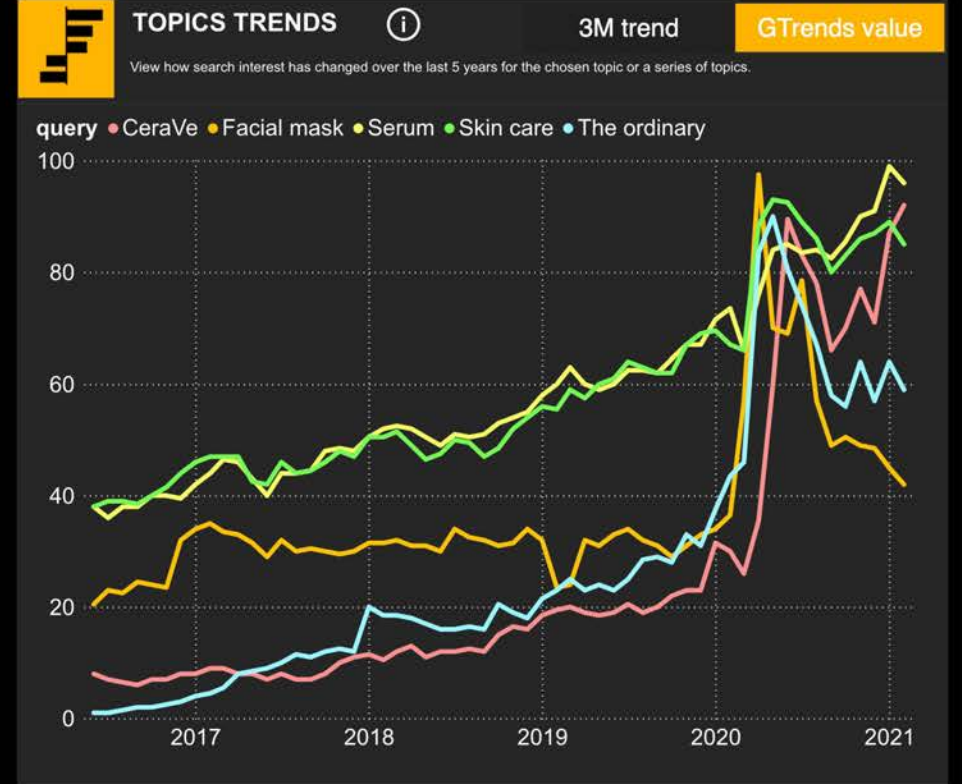
3 MONTH TREND  
-67.0% 26.9%

2 YEAR TREND  
-82.9% 236.8%

### SELECT TOPICS

View the search volumes by topic and how their search has grown or declined over time. Click on any topic to filter the RELATED SEARCH QUERIES. Click column headers to reorder any column.

topic	link	4wk	3M	2Y	avg monthly volume
CeraVe		7.0%	26.9%	236.8%	177,338
Facial mask		2.1%	8.2%	73.0%	203,873
The ordinary		1.5%	5.9%	80.9%	142,971
Skin care		1.1%	4.1%	35.6%	903,729
Serum		0.9%	3.6%	32.1%	815,643
Face		0.8%	3.1%	23.6%	8,137,997
Toner		0.8%	3.0%	27.3%	384,699
Facial		0.8%	2.9%	23.7%	1,013,726
Brush		0.7%	2.6%	18.1%	2,535,091
Exfoliation		0.7%	2.6%	21.1%	549,347
Cleanser		0.5%	2.1%	21.5%	1,212,832
Moisturizer		0.5%	2.0%	21.2%	743,324
How-to		0.5%	1.7%	13.8%	48,013,081
Human skin		0.4%	1.7%	14.1%	676,019
Acne		0.5%	1.7%	11.1%	2,789,028
Eye liner		0.3%	1.3%	10.5%	453,230
Beauty		0.3%	1.0%	6.3%	3,357,422



RELATED QUERIES: These are the potential emergent search trends. There are various tools to filter, sort, select & view features of these trends - to help you identify key trends for the selected topics.

### QUERY SELECTOR

A list of filters that can be applied to related search queries based on search volumes and growth values.

RELATED QUERIES - MONTHLY SEARCHES

### RELATED SEARCH QUERIES

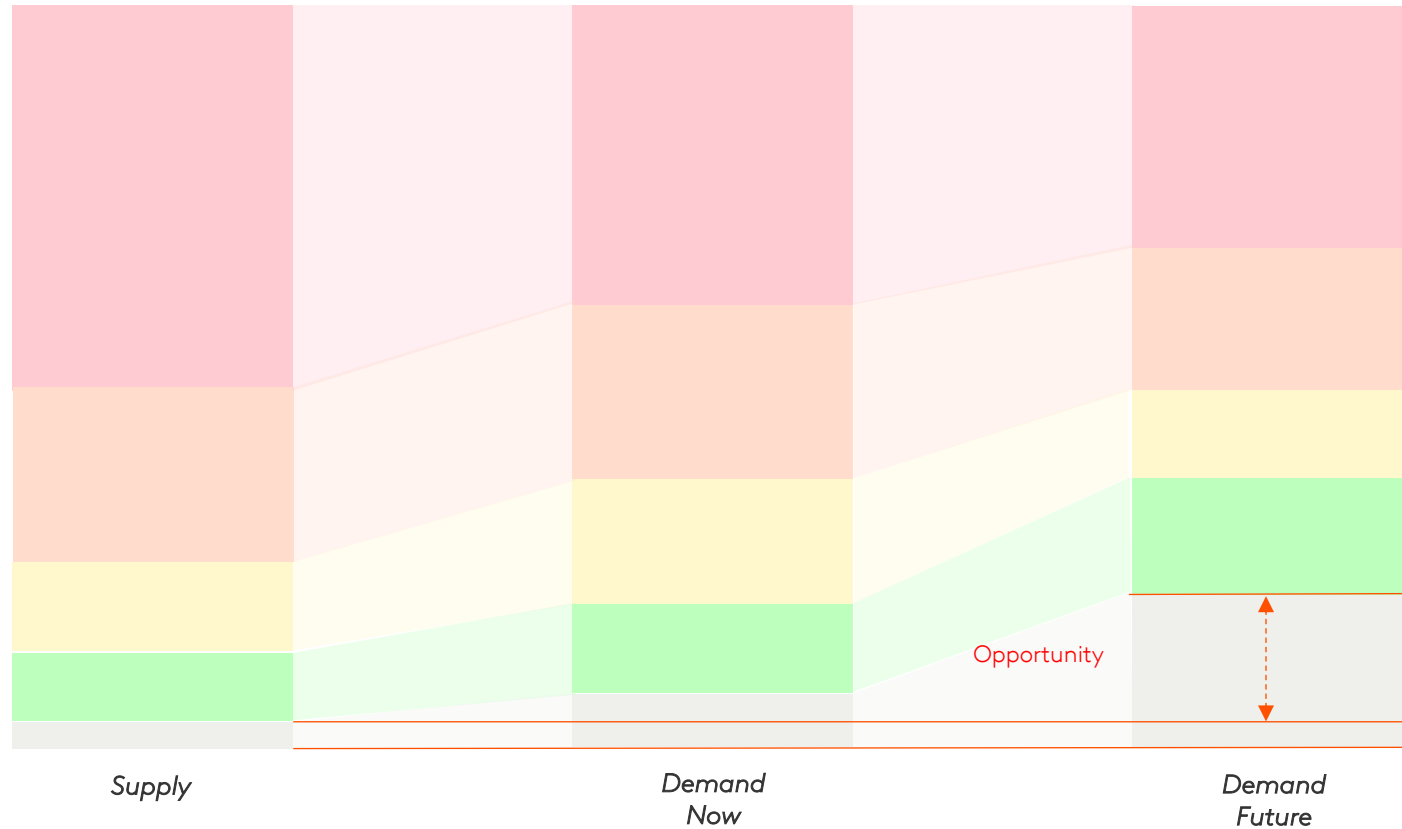
View the search queries that are related to the topics selected in the TOPIC SELECTOR, their average monthly search volumes and how search has grown or declined over time. Select a query then click on the button on the right for a single page view of that query.

See detail for selected query

query	translation	link	4wk	3M	2Y	monthly volume	4wk trend	3M trend	2Y trend
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### 3. Why 'niches' matter

Finding gaps where supply doesn't meet demand

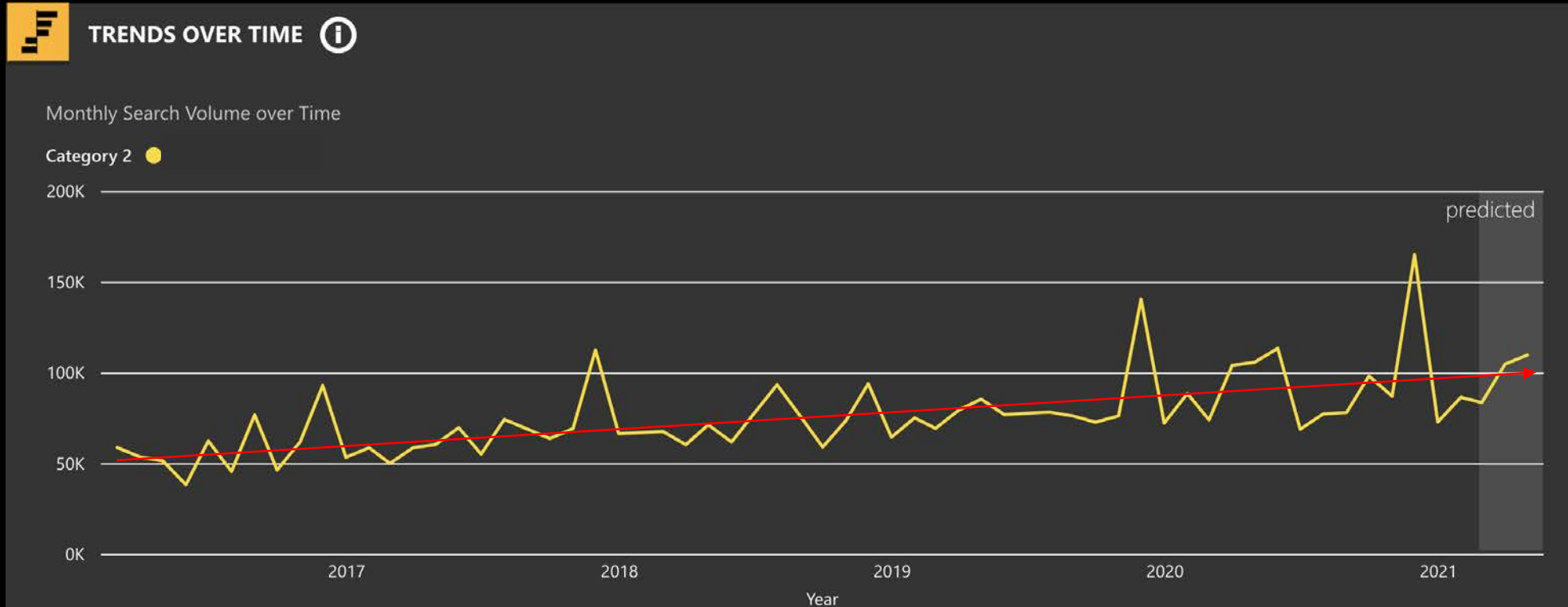




### 3. Why 'niches' matter

Finding gaps where supply doesn't meet demand

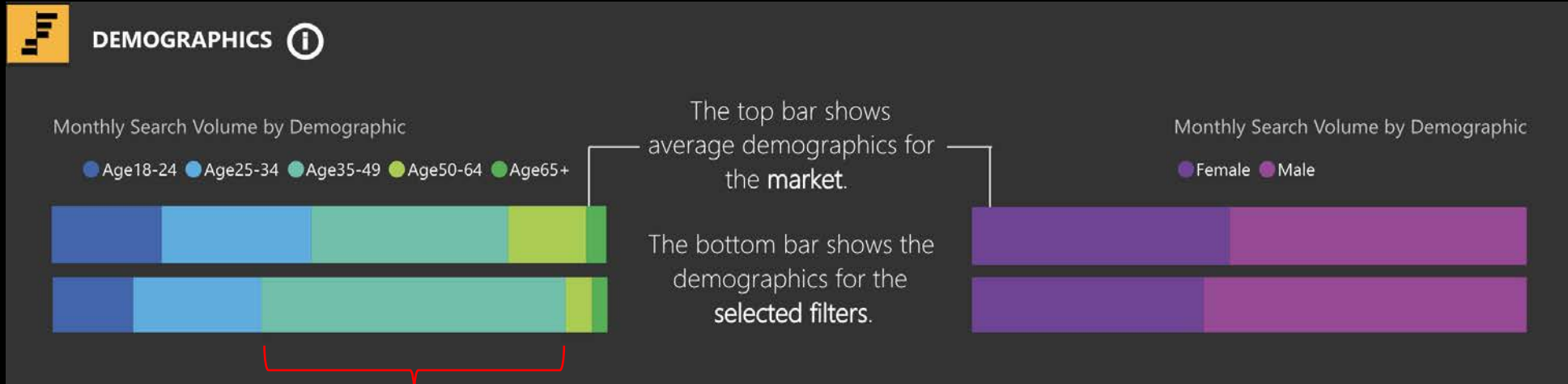
A growing area...



### 3. Why 'niches' matter

Finding gaps where supply doesn't meet demand

Attractive to wealthier demographics



Higher proportion of 35-49-year-olds

### 3. Why 'niches' matter

Finding gaps where supply doesn't meet demand

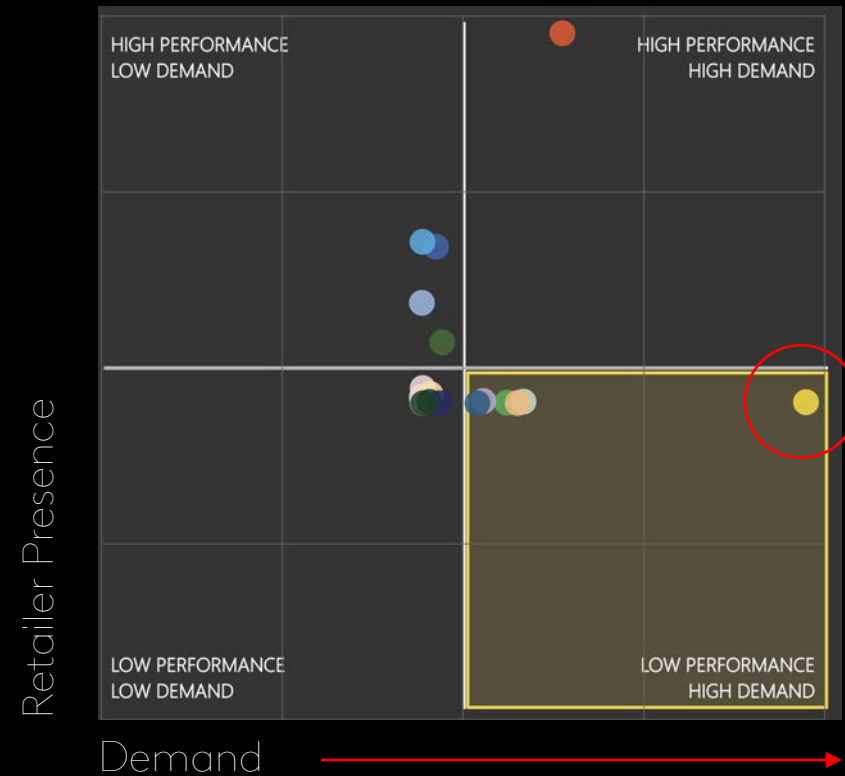
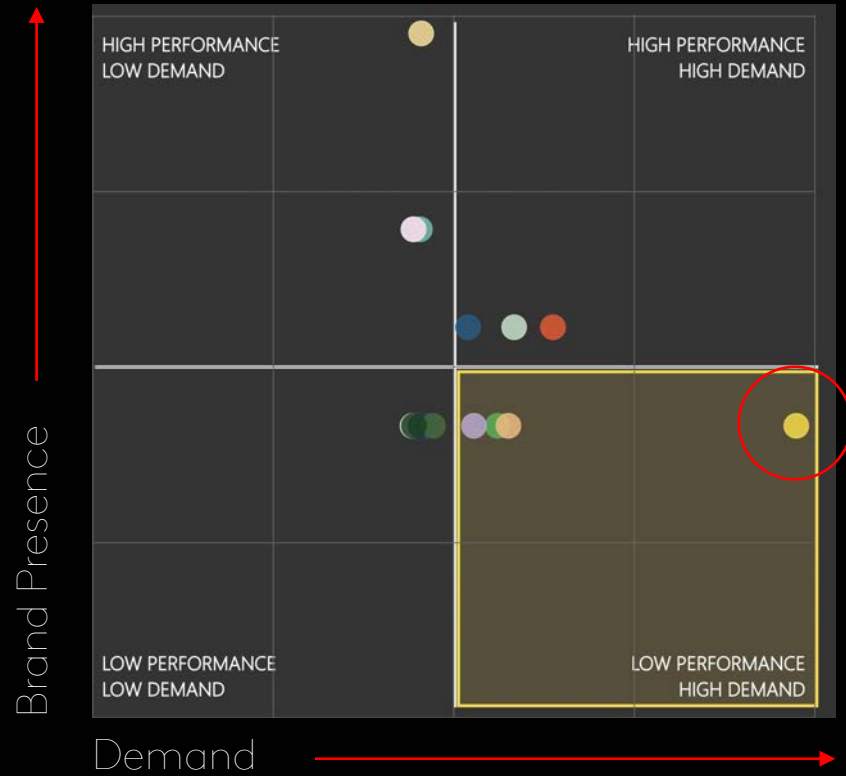
In urban areas



### 3. Why 'niches' matter

Finding gaps where supply doesn't meet demand

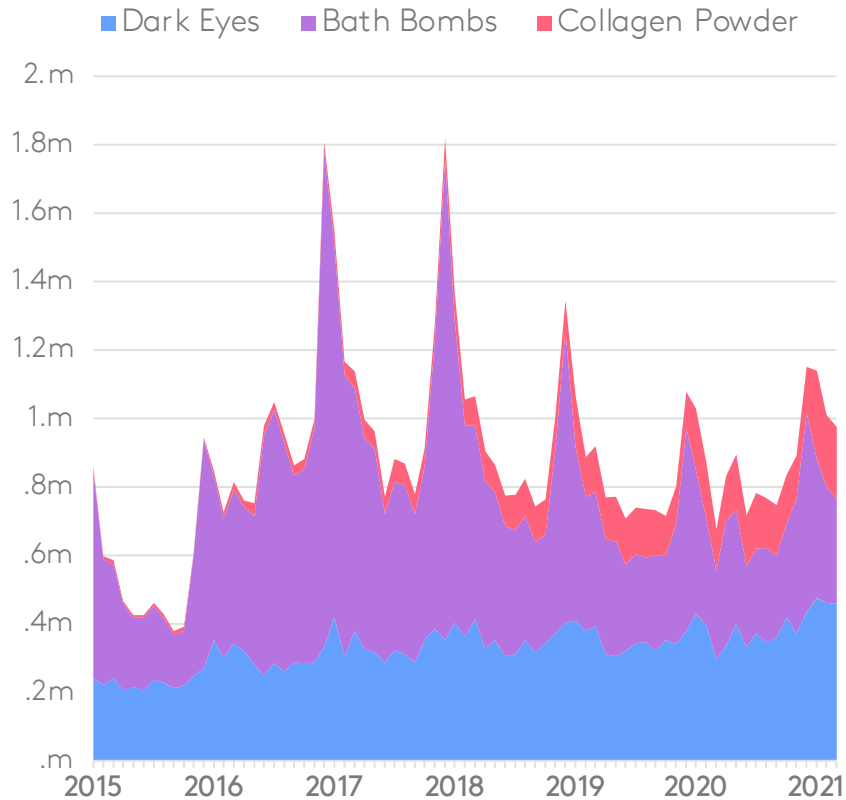
Where brands and retailers have not yet colonised



# 4. Trends can be driven by consumers or by companies

Balance the opportunities from consumer needs and the specifics of new products

## Demand-Side Consumer Trends



## Supply-Side Company Trends

360 Product results: "eye cream"

Sort by: Relevancy

Retinol	<p>only at sephora <b>OLEHENRIKSEN</b> Banana Bright Eye Crème \$39.00 ★★★★☆ 4K</p>	<p>only at sephora <b>The INKEY List</b> Retinol Eye Cream \$9.99 ★★★★☆ 419</p>	<p>only at sephora <b>The INKEY List</b> Caffeine Eye Cream \$9.99 ★★★★☆ 1.1K</p>	Caffeine
Moisturize	<p>only at sephora <b>OLEHENRIKSEN</b> Wrinkle Blur™ Bakuchiol Eye Gel Crème \$49.00 ★★★★☆ 538</p>	<p><b>belif</b> Moisturizing Eye Bomb \$48.00 ★★★★☆ 2.5K</p>	<p>only at sephora <b>SEPHORA COLLECTION</b> Brightening Eye Cream – Hydrate &amp; Depuff \$17.00 ★★★★☆ 802</p>	Brightening
Wrinkles	<p><b>REN Clean Skincare</b> Brightening Dark Circle Eye Cream \$49.00 ★★★★☆ 181</p>	<p>only at sephora <b>Youth To The People</b> Dream Eye Cream with Goji Stem Cell and Ceramides \$48.00 ★★★★☆ 257</p>	<p>only at sephora <b>SEPHORA COLLECTION</b> Hydrate &amp; Depuff \$17.00 ★★★★☆ 802</p>	Dark Circles
Hydrate				Goji Stem Cell
				Ceramides
				Depuff



## 5. What do we mean by 'predictive'?

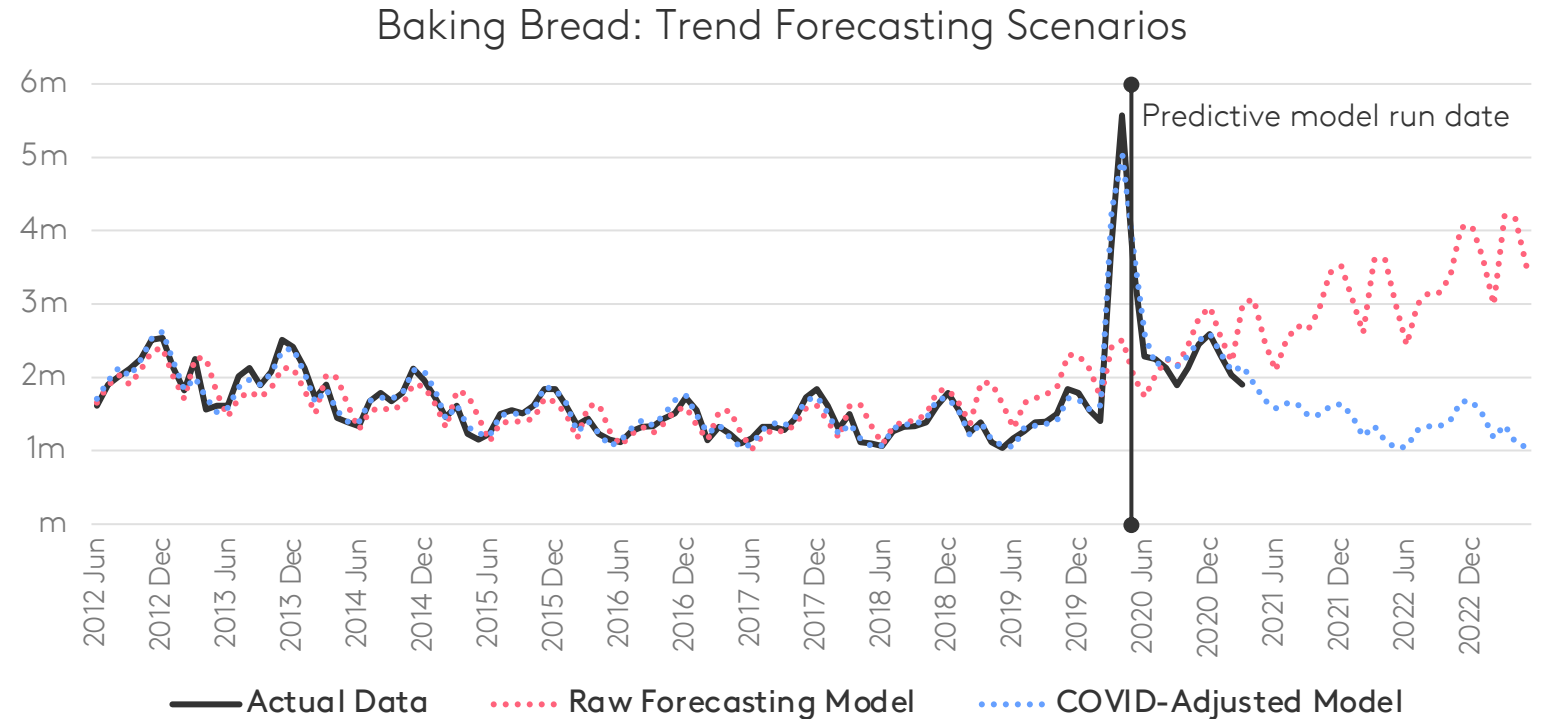
Predicting the future is hard, but there are ways to do it better...

### Bayesian Time Series modeling

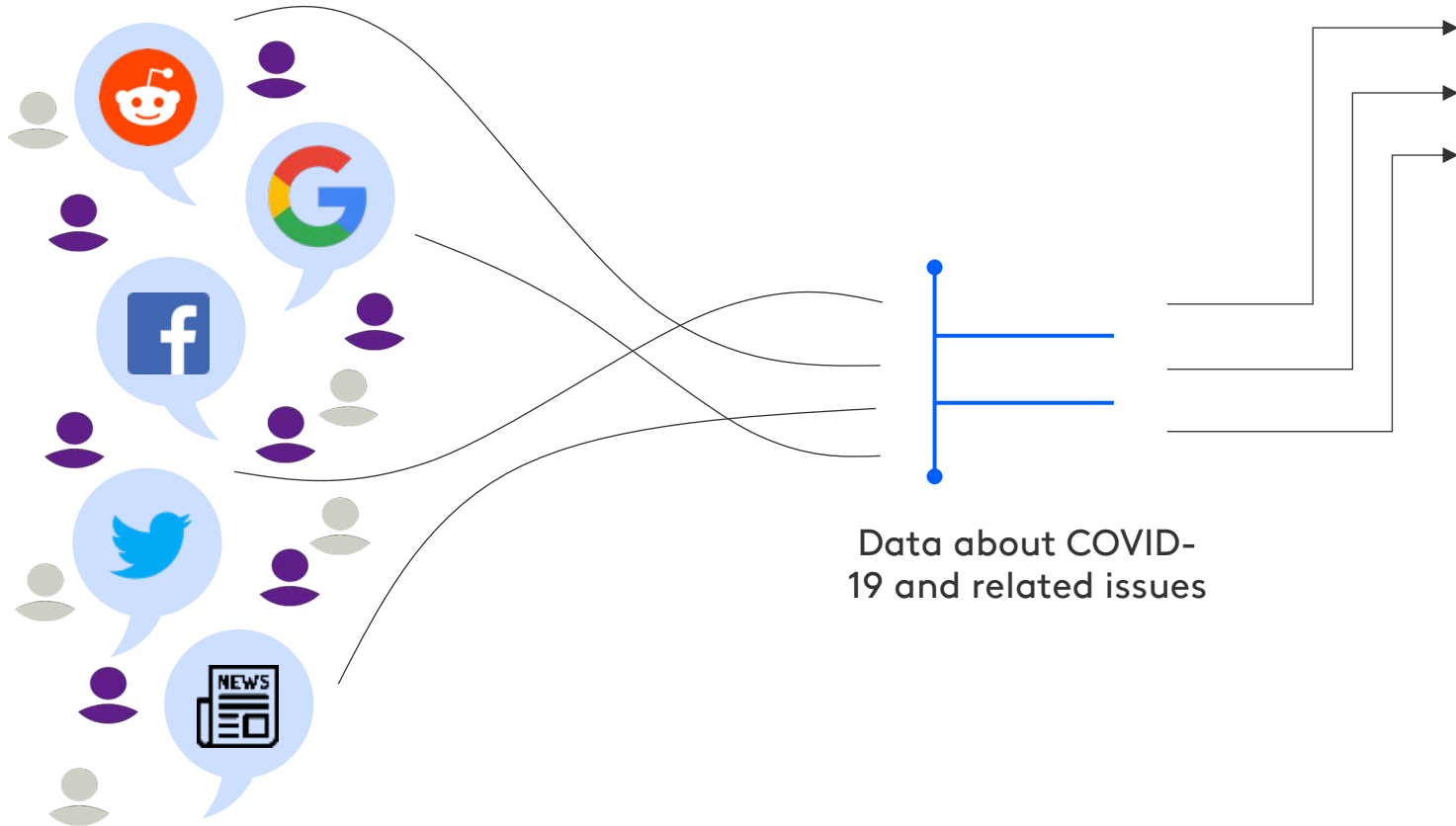
Kantar's Dx predictive modeling approach combines rich, unsampled, real-time digital indicators with industry best practices for time series projections, including:

- Seasonality
- Underlying Trend
- Changepoint Detection
- Uncertainty Windows

### Exogenous events (i.e. COVID-19)

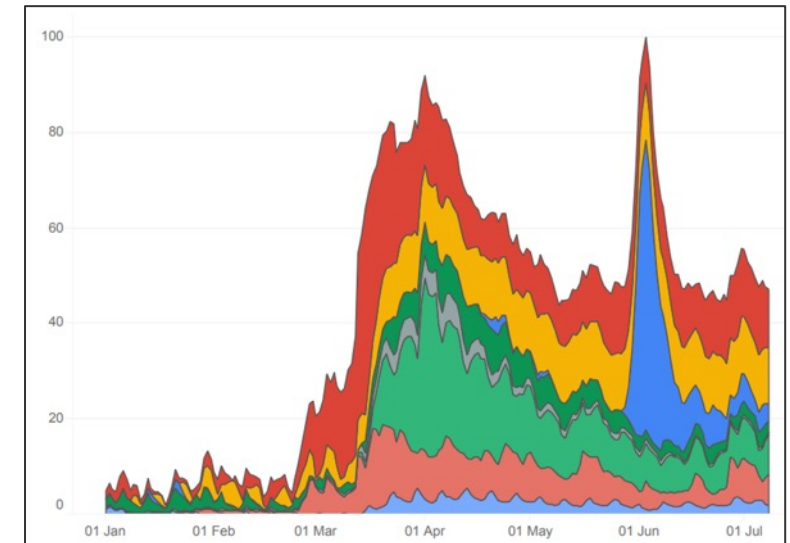


## 6. Why 'macro' matters



- 1 Infection Anxiety
- 2 Job Insecurity & Unemployment
- 3 Lockdown Pressure

e.g. Disruption index



# Take outs

In the current climate, it's more pressing than ever that brands have a solid trends machine in place.

This machine must:

1. Be fast
2. Bring trends from the outside in
3. Evaluate where supply is not matching demand
4. Focus on consumers and companies
5. Be predictive (hard!)
6. Act at both micro and macro levels

# Dx Analytics:

Wrap-up + Q&A



**Discover what others cannot.**  
At speed and at scale.



### **Future Proofing**

(innovation & consulting)

Identify **trends** and growth opportunities faster than humanly possible across categories.

### **Brand Blueprint**

(brand strategy & guidance)

**Understand people** better and win critical moments of truth. Uncover underserved needs and track brand strength.

### **Digital Mastery**

(media & content)

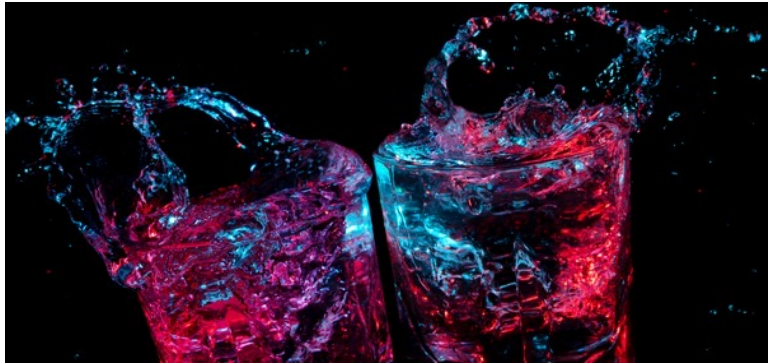
Boost your digital presence and **performance** with best practice digital marketing analytics support, powered by data science technology.



# From tactical to strategic briefs from small to big wins

## Example client questions answered

### [Alcohol Client]



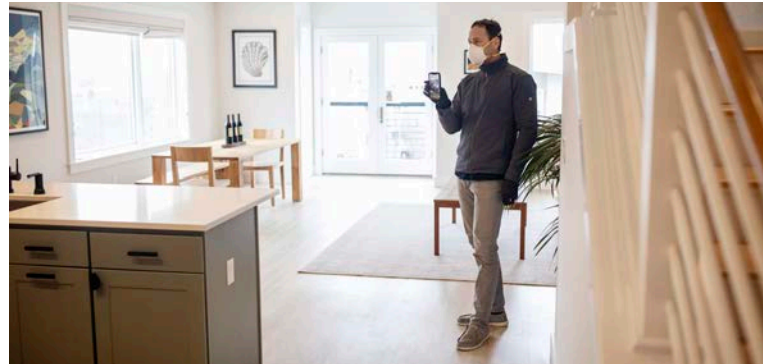
How do I stay on top of cocktail trends?  
Which spirits are likely to drive portfolio growth? Who are the whiskey consumers?

#### Future Proofing

Opt. size: \$10k to \$100k

Emerging Trends, Search Landscape,  
Digital Communities

### [Real Estate Tech Client]



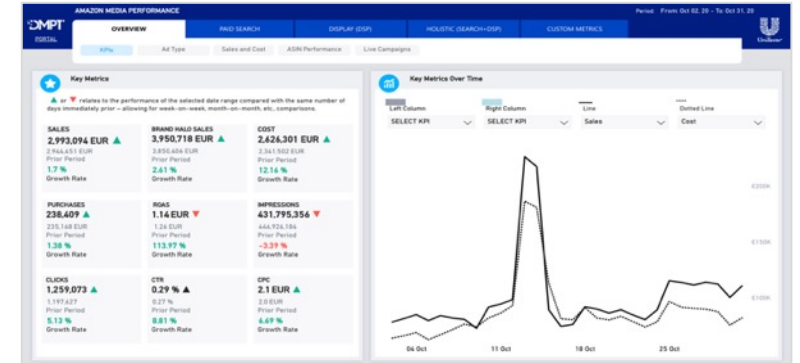
What safety concerns are preventing consumers from engaging in the real estate market? How can we signal our commitment to safety?

#### Brand Blueprint

Opt. size: \$30k to \$80k

Social Landscape

### [Multinational CPG Client]



How can I optimize my digital activity in one place?

#### Digital Mastery

Opt. size: \$30k to \$500k

Digital Ecosystem Analytics

# Kantar Analytics Live: April 21st

## Building Brand Intelligence to Better Connect with Consumers



[Register Here](#)

### Panelists:

Matt Dodd (Host), Head of Market Development, Analytics Practice, EMEA, **Kantar**

Anna Papadopoulos, Vice President, Media & Sponsorships, **Prudential**

Chris McClure, Director, Strategic Planning, **Mazda North American Operations**

Pinaki Dutt, Global Head, Consumer-Centric Measurement, **The Coca-Cola Company**

Tina Moffett, Principal Analyst, **Forrester**

Kantar's new webinar series, *Analytics Live*, is a live panel event where we discuss the most pressing issues facing today's marketing leaders by speaking directly with the experts and influencers on the ground, discovering where they've found success and overcome challenges.

# KANTAR

**Thank you!**  
(Q&A)

**For questions & next steps:**

[James Campbell](#)

*(Managing Director, Dx North America)*

[Ula Jones](#)

*(Managing Partner, Brand Strategy & Innovation)*

[Olivia Trozze](#)

*(Director, Dx – Digital Mastery)*

[Girisa Achaibar](#)

*(Senior Consultant, Dx – Brand Blueprint)*



**Dx Analytics**